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P-CARD USER MANUAL

ADDING A GROUP NAME (GROUP CARD)

INTRODUCTION

A **Group Name** is the name of a "Group Card", which is a P-Card issued to the agency for multiple users. Only one card is associated with a **Group Name**. Individual users are added as a Proxy Verifiers to the Group Card. NOTE: Some merchants require an individual's identification to match the name on the Group Card at the point of sale. Also, online merchant forms may require a valid first name and last name. Contact Wells Fargo for more information and possible workarounds.

TO ADD A GROUP NAME

On the **Admin** screen, check the **Group Name** check box. (When **Group Name** is checked, the individual usernames will not be displayed. Uncheck the **Group Name** check box to view the individual users.)

Figure 1 - Admin selection for Group Name



- 2. Click **Add Group**.
- 3. Type a **Group Name** and make sure the **Active Group** check box is checked.

Figure 2 - Group Name



4. Click **Save** (on the top menu bar) before adding a credit card number.

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TO ADD A CREDIT CARD NUMBER

NOTE: Only one card can be added to a **Group Name**.

- 1. Enter the last six digits of the P-Card number in the CC# field. NOTE: Do not use a placeholder (e.g., 999999). Actual credit card numbers must be entered into the application.
- 2. Select **Active** to make the card active in the P-Card application. The P-Card can be active for one group, although a group may have several card numbers assigned to it.
- 3. Enter a **Description** (recommended).
- 4. Click **Save** next to the card information.



- 5. Click the down arrow of the **Proxy Verifier** menu and click the name to add.
- 6. Click **Add** to add the proxy verifier to the card.





TO ADD A DEFAULT PCA OR INDEX

Set up a Default Index or PCA for the group card to automatically fill in the PCA/Index code for the card in the Verifier's transaction grid. If your PCA/Index codes look up other fiscal codes, those other fiscal codes will also be automatically filled in.

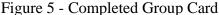
- 1. Select **Choose Default PCA** or **Choose Default Index** (the choice displayed depends on your agency structure) to assign a default PCA or Index.
- 2. Click **Select** next to the PCA or Index needed. The **Default PCA/Index** will be added.

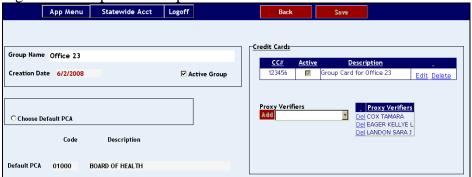
Figure 4 – Adding a Default PCA or Index



COMPLETED GROUP NAME

1. When the **Group Name** is complete, you can click **Back** to go to the **Admin** screen or click **Logoff**.





2. When going back to the **Admin** screen, uncheck the **Group Name** check box to view the individual users.